

**Guidelines  
For Endowed Appointments**

Effective September 29, 2025, OU Health Campus endowed appointments shall comply with the following guidelines:

**1. Appointments:**

- a. Endowed appointments must include a term and a statement regarding whether the term is renewable.
- b. Term appointments of 1 to 5 years are acceptable, unless otherwise prohibited by the terms of the donor agreement. NOTE: 5-year appointments are generally reserved for deans and department chairs.
- c. Appointments with terms of 3 years or less will be exempt from the requirement of a search or formation of a search committee.
- d. Term appointments of up to 5 years will be exempt from the requirement of three recommendation letters from external experts in the field.

**2. Salary Requirements Against Interest Earnings:**

- a. A minimum of 60% of annual interest earnings generated by the chair/ professorship (includes the collective, estimated annual interest on State Regents', OU Regents', and OU Foundation funds) **must be** applied to the EDWCH holder's University salary.
- b. An exception can be requested in those cases where the majority of the EDWCH holder's base salary is paid by SPNSR funds or where the Senior Vice President and Provost approves otherwise, on recommendation of the dean.

**3. Other Allowable Expenditures:**

- a. Allowable expenditures consistent with the donor agreement are authorized from the EDWCH interest earnings:
  - i. Earnings may support the research lab and educational or clinical programs that provide benefit to the EDWCH holder or as designated by the donor agreement.
  - ii. Expenditures could include, but are not limited to: support personnel, supplies, equipment, travel, and program operating expenses.

**4. Rollover of Unexpected Interest Earnings to Principal at the OU Foundation:**

- a. The OU Foundation has been authorized to sweep all disburseable/expendable interest earnings that exceed two years of earnings for endowed accounts and move those funds into the principal or corpus of the endowed account in June of each fiscal year.
- b. Requests for exceptions to the sweep must be approved by the dean and Senior Vice President and Provost.

**5. Appointment Evaluation & Renewal:**

- a. Appointments to endowed appointments are subject to annual review, which may occur as part of the University's annual performance review. The dean or Senior Vice President and Provost, as appropriate, will review each holder's documentation showing how they are meeting the requirements and expectations outlined in the holder's appointment letter.
- b. An endowed appointment holder who does not meet the criteria and expectations of the endowed appointment will be removed from the endowed appointment.
- c. Upon term expiration, the holder may retain the title, noting terms (ex., Jane Doe, Miller Endowed Chair, 2020-2024)

**6. Relinquishment of Endowed Appointment:**

- a. Individuals who terminate, retire, or resign from their position associated with their endowed appointment relinquish their endowed appointment on the effective date of termination, retirement, or resignation. Residual funds remain in the endowment.